



Timeline/Marketing

November 26, 2012	Website LIVE – www.collegecountsalabama.com
November 27, 2012 9:00 a.m.	Press Conference to Announce Program Wetumpka High School Gymnasium, Wetumpka, AL
By December 10, 2012	Material to school counselors
January 2, 2013	APPLICATION LIVE
March 7, 2013	APPLICATION PERIOD ENDS
By May 1, 2013	Winner notifications sent

Marketing Items:

Website and Online Application

Two E-blasts to counselors – week of announcement and a week prior to application deadline

Tab on CollegeCounts Facebook page

Mailing to 709 packages to 380 schools

- Letter from Treasurer Boozer
- Postcards

800 flyers and table stand for counselor conference

Pull-up Banner for press conference and other events



CollegeCountsAlabama.com

APPLICATION PERIOD

January 2, 2013 - 12:01 AM CST

March 7, 2013 - 11:59 PM CST



SCHOLARSHIP DETAILS

- Awards of \$4,000 for four-year colleges.
- Awards of \$2,000 for community and technical colleges.
- Award is non-renewable and granted on a semester basis.

APPLICATION PERIOD

January 2, 2013 - 12:01 AM GST
March 7, 2013 - 11:59 PM GST

ELIGIBILITY

Applicants must meet all of the following criteria to be eligible for this scholarship:

- Must be a high school senior or first-time college freshman
- Must be a US citizen
- Must be an Alabama resident
- Must demonstrate financial need
- Must be enrolled or planning to enroll in an Alabama eligible educational institution
- Must have a minimum GPA of 2.75
- Must have an ACT score of 26 or below (applicants attending a two-year school will not be required to submit ACT scores)

ENROLL NOW



For more information and to apply for the CollegeCounts Scholarship, visit www.CollegeCountsAlabama.com



CollegeCounts

2013-14 Frequently Asked Questions

Who is eligible to apply?

When is the deadline?

What are the details of the award?

What are the selection criteria?

I have several potential school choices. Which one should I list on the application?

How and when will I receive notification?

What are my responsibilities if I am chosen as a recipient?

How and when are checks issued?

Where and when should I send my supporting documents?

How do I know if my application is complete?

Program Administration

Questions

What is the source of the scholarship money?

Administrative Fees

AHELC Surplus Funds

Who is eligible to apply?

Applicants must meet all of the following criteria to be eligible for this scholarship:

- Must be high school senior or first-time college freshmen
- Must be a US citizen
- Must be an Alabama resident
- Must be enrolled or planning to enroll in an Alabama eligible educational institution
- Must demonstrate financial need
- Must have a minimum GPA of 2.75
- have an ACT score of 26 or below (applicants attending a two-year school will not be required to submit ACT scores)

What if my ACT score changes after I submit my application? Should I update you on my score? No. The scores that you submitted before **March 7** are sufficient.

I am a home-schooled student. Can I apply? Yes.

Note: Applicants may not be a relative of any members of the Alabama College Education Savings Board of Directors (ACES) or employees of the Alabama State Treasurer's Office, International Scholarship and Tuition Services, Inc., Red Square Agency or any company that is contracted by the ACES Board.

When is the deadline?

The application will open at 12:01 am CST on January 2, 2013 and will close at 11:59 pm CST on **March 7, 2013**.

What are the details of the award?

- Scholarships will be awarded annually to residents in Alabama.
- Awards amounts will be up to \$2,000 per semester.
- The award is non-renewable and will be granted for the fall and spring semesters of the recipient's freshman year.
- The scholarships will be applied to tuition, fees, books, supplies and equipment required for course load. For full details on the use of funds, please reference the 'Qualified Education Expenses' section of the following link:
<http://www.irs.gov/publications/p970/ch08.html>.
- Institutions must be accredited, nonprofit two or four-year colleges/universities in the state of Alabama.

No Obligation to Make Scholarships. The ACES Board shall have the discretion to decide not to award scholarships in a given year and is also not obligated to award a certain number of awards or dollar amount of awards in a given year.

How are scholarship recipients determined?

The Board has established a selection process based upon criteria that can be objectively measured. This criterion includes, in priority order, financial need, ACT score (for four-year school applicants), high school GPA, work/activities, service and honors/awards. Other information submitted in the application can be considered as well. It is a goal of the program to award at least one scholarship to a qualified applicant from each county in Alabama. Additional scholarships may be awarded based on population of the county and financial need of the applicant.

Efforts to Influence Selection Process Prohibited

The integrity of the application process is of primary importance and will not be compromised. Any written or oral communications beyond the application submission made by responders, or others on their behalf, to influence the selection process, from the time the application is submitted through the completion of awards, made directly or indirectly to the State Treasurer, ACES Board members or Treasury staff will be grounds for immediate elimination from the selection process.

Selection decisions are final and are not subject to appeal. No application feedback will be given.

I have several potential school choices. Which one should I list on the application?

You should list your first choice on the application. If you are chosen to receive an award, it will be your responsibility to make certain that the ACES Board is aware of your final school choice so that your award can be issued accordingly.

How and when will I receive notification?

- Notifications are sent approximately two months past the deadline.
- Winner and non-winner notifications will be sent by email.
- Add collegecounts@applyists.com to your email address book or "safe senders list" so these important emails are not sent to your junk mail folder.
- Do not 'opt out' of any email sent from collegecounts@applyists.com or you may not receive vital information regarding your scholarship applications.

Your email address will only be used to communicate with you about your scholarship applications. You must agree to maintain the email address submitted on the application until award notifications are complete. We will not provide your email address to any third-parties.

What are my responsibilities if I am chosen as a recipient?

- You must enroll as a full time undergraduate in the fall of the year in which the scholarships are awarded.
- You must continue in school the entire academic year without interruption unless approved by scholarship sponsor.
- All students receiving a scholarship from the Program must utilize their scholarship during the fall or spring semester in the same academic year from the date their scholarship is awarded.

How and when are awards issued?

- Payment of awards will be mailed to your accepted institution after the drop/add period, as confirmed with the ACES Board.
- Payments will be made to the institution only.
- Payments will be issued in the fall and spring.

Where and when should I send my supporting documents?

- Upload your required documents online. If you are unable to upload them, please mail your supporting documents following the instructions printed from your online application (if you do not follow the instructions exactly your application may not be considered).
- Your submission must be complete online by March 7, 2013. All mailed documents must be postmarked by March 7, 2013.

How do I know if my application is complete?

- Allow five to seven business days after uploading documents for your online status to update.
- You may monitor your status of each required form and attachment on your home page at aim.applyists.net/CollegeCounts. The following are various stages where your application could be:
 - **Not Started** - the form has not been requested or started
 - **Started** - the form has not been submitted
 - **Submitted** - the form has been submitted
 - **Not received** - the attachment has not been received

- **Processing** - the attachment has been received and is being processed and verified
- **Accepted** - the attachment has been verified and accepted by ISTS
- **Requested** - the form request has been created, but the form has not been started
- **Complete** - all required forms and attachments (if applicable) have been received and your application will be considered for the scholarship

Program Administration

To assure complete impartiality in selection of award recipients and to maintain a high level of professionalism, the program is administered by International Scholarship and Tuition Services, Inc., a firm that specializes in managing sponsored scholarship programs. Please do not contact the ACES Board directly.

Who should I contact if I am having trouble with the online application?

The *CollegeCounts* Scholarship Program is managed by ISTS, International Scholarship and Tuition Services, Inc. You may contact them by clicking on the *Live Chat* within the online application or by calling 1-800-310-4053, Monday-Friday, 8:00 am-5:00 pm CST, or by emailing collegecounts@applyists.com.

What is the source of the scholarship money?

There are two primary funding sources for Alabama's CollegeCounts 529 Scholarship Program.

Administrative Fees

"CollegeCounts 529 Fund" is the marketing name for what is actually known as the ACES Trust Fund under Alabama law. The ACES Trust Fund is part of the ACES Program, which was established as a college savings alternative that allows contributors to open savings accounts to pay for a beneficiary's qualified educational expenses at an eligible institution of higher education. These savings accounts can be sold directly to individuals or sold to individuals by financial advisors. The ACES Trust Fund receives a 0.10% administrative fee each year from the assets held in the advisor-sold program.

AHELC Surplus Funds

The Alabama Higher Education Loan Corporation (AHELC) was established to provide student loans to Alabamians. After a long period of inactivity, AHELC was revived, only to see its business model abolished by the U.S. Congress. As a result, the AHELC Board of directors chose to cease operations, dissolve the nonprofit corporation, and grant the existing surplus to help fund Alabama's CollegeCounts Scholarship Program. This decision was made in accordance with AHELC's founding purpose of funding higher education student aid.

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INTERNATIONAL SCHOLARSHIP
AND TUITION SERVICES, INC.

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* indicates a required field.

Application Saved

Your application has been **saved**. You may now exit and return to finish at a later time, or **Submit** your application below. Do not wait for any supplements or required documents to be received before you **Submit** your online application. You may return at any time prior to the deadline to make changes to the information you provided.

Terms and Conditions

I, John Doe, certify, to the best of my knowledge, that the information on this application is complete and accurate. Falsification of any information will cause my disqualification from the scholarship competition.

I understand it is my responsibility to make sure the application process is complete by the required deadline. If not, the application may be disqualified from the awards competition and may not be considered for an award.

This application, upon receipt, becomes the property of the program sponsor, Alabama College Education Savings Board of Directors.

I agree that, if selected as an award winner for the CollegeCounts Scholarship Program, the program sponsor or its agents may use my name and likeness and any other information or materials provided in connection with this program for purposes of news, publicity and advertising in all media, including but not limited to print and electronic media, press releases, internet websites, and video media.

I (we) understand, agree and acknowledge that the decision to award a scholarship for which this application is submitted is within the sole discretion of the Alabama College Education Savings (ACES) Board of Directors and shall be based upon the selection criteria in effect on the date of award. The award and funding of scholarships is dependent upon the availability of funds. Applying for this scholarship does not create or establish a right or entitlement under Alabama law to the award or use of any funds for any purposes whatsoever. The terms and conditions of scholarship awards may be amended or modified by the ACES Board at any time without notice to scholarship recipients or applicants.

In no event shall the ACES Board or ISTS be liable for any special, incidental, indirect or consequential damages of any kind, or any other damages whatsoever, under any theory of liability arising out of or in connection with the use or performance of the scholarship application process.

The integrity of the application process is of primary importance and will not be

Live Chat

compromised. Any written or oral communications beyond the application submission made by responders, or others on their behalf, to influence the selection process, from the time the application is submitted through the completion of awards, made directly or indirectly to the State Treasurer, ACES Board members or Treasury staff will be grounds for immediate elimination from the selection process.

Selection decisions are final and are not subject to appeal. No application feedback will be given.

To comply with the provisions of the Family Educational Rights and Privacy Act of 1974, I hereby grant permission for school officials to release secondary school records and other requested information, if necessary.

If you are under 18, your parent or guardian must also agree to these Terms and Conditions.

I agree that I will maintain the email address submitted on this application until award notifications are complete.

Submit

*I have read and agree to the terms and conditions for submitting this application.

☐

Submit

[CollegeCounts Scholarship Program Privacy Policy.pdf](#)

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[Privacy Policy](#)

**CollegeCounts Scholarship Program
Office of State Treasurer**

ITEMS FOR BOARD APPROVAL

Mission

To provide funding assistance for Alabama students who have financial need and enroll at an Alabama educational institution for the betterment of the student and the State.

Award Amounts. Scholarships will be awarded in the amounts of \$4,000 per year to recipients attending a four-year college or university and \$2,000 per year to recipients attending community or technical colleges. Awards will be paid on a semester basis directly to the college.

Award Uses. Scholarships may be applied to tuition, fees, books, supplies and equipment required for course load per IRS 529 code for Qualified Tuition Programs.

Criteria for Scholarship Eligibility

Applicants must meet the following criteria to be eligible for this scholarship:

- be high school senior or first-time college freshman
- be a US citizen
- be an Alabama resident
- be enrolled or planning to enroll in an Alabama eligible educational institution
- demonstrate financial need
- have a minimum GPA of 2.75
- have an ACT score of 26 or below (applicants attending a two-year school will not be required to submit ACT scores)

Award Selection. Scholarships will be awarded based upon the applicant's eligibility criteria, county population metrics as reported by the U.S. Census Bureau and other measurable criterion including financial need, ACT score (for four-year school applicants), high school GPA, work/activities, service, honors/awards (see weightings below).

Award Weightings:

4-Year College

Need – 50%

ACT Score – 20%

GPA – 10%

Work/activities – 13%

Service – 5%

Honors & Awards – 2%

2-Year College

Need – 50%

Work/activities – 25%
GPA – 20%
Service – 5%

In the case that a tie-breaker is needed, awards will be made on a first come, first serve basis, in which the date/time stamp recorded for each applicant's entry will be used.

Award Distribution. Scholarships will be awarded at least one scholarship to a qualified applicant from each county in Alabama. Additional scholarships may be awarded based on population weightings of the county to the state's population. If a county does not have a qualified applicant then that county's allotted scholarship(s) will be reallocated and awarded to another county based on population weightings.

Number of Awards. For the first year Fall 2013, 150 scholarships totaling up to \$600,000. Each year thereafter, the number of scholarships to be awarded will be determined annually after a review of the previous year's distribution.

Award Source of Funding. Funding shall be derived from the administrative fee monies received annually and not needed for administrative expenses, and supplemented with earnings from the Opportunity Enhancement Fund investments as needed.

PROPOSED RESOLUTION OF THE BOARD OF DIRECTORS OF THE
ALABAMA COLLEGE EDUCATION SAVINGS PROGRAM

At its Meeting November 7, 2012

Topic: CollegeCounts Scholarship

WHEREAS, the Board of Directors (herein the "Board") of the Alabama College Education Savings Program (marketed as the CollegeCounts 529 Fund), is created in Section 16-33C-5 of the Code of Alabama (1975), as amended; and

WHEREAS, pursuant to Section 16-33C-10(g), Code of Alabama, the ACES Opportunity Enhancement Fund has been established for the purpose of enhancing and providing higher education opportunities and programs, as the Board deems necessary and appropriate, and the funds shall be utilized solely in the discretion of the Board; and,

WHEREAS, the Board has determined it is in the best interests of the state to create the CollegeCounts Scholarship Program;

NOW THEREFORE, BE IT RESOLVED, that, after careful consideration and discussion, the form of the Terms and Conditions, the Application, and the General Scholarship Criteria, in substantially the form presented to the Board at its meeting and attached to this resolution, are hereby approved and authorized, with such additions thereto and deletions therefrom as the Chair of the Board shall approve, with such approval to be conclusively determined by the Chair's execution thereon.

RESOLVED, FURTHER, that the Chair, for and on behalf of the Board, is hereby authorized and empowered to take any and all such other actions as the Chair determines are necessary or required in order to effectuate the offering of the CollegeCounts Scholarship Program in or about January 2013 for scholarships to be awarded for the Fall 2013 school term. Any such action shall be reported to the Board at its next regular meeting.